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ABSTRACT

Developed by the University of Maryland for the Maryland-D.C. Nursing Home Association, these two series, each containing 84 hours of instruction in four three-day seminars, were designed to meet nursing home administrators' need for managerial skills and to prepare them for licensing. (Based on experiences with the first series, course materials and faculty were changed slightly in the second.) Preliminary conferences with 15 administrators showed favorable reactions to experience-based learning materials and discussion rather than passive learning. Seminars dealt, respectively, with planning and general concepts, leading and directing, measuring and controlling, and practical integration of knowledge and skills gained in the other seminars. One textbook (Leavitt's "Managerial Psychology") and a manual of 15 readings, were used. Tuition per series was $460 for Association members, $560 for nonmembers. Certificates of participation went to 58 persons in all. The seminars were largely rated good or excellent. However, two of the seminars (mainly informational lectures) were not so well received, and participants would have liked more time spent on presentation. Based on findings, it was proposed that the curriculum be revised to include 112 hours of instruction, possibly in four seminars of 3 1/2 days each during each semester. (LY)

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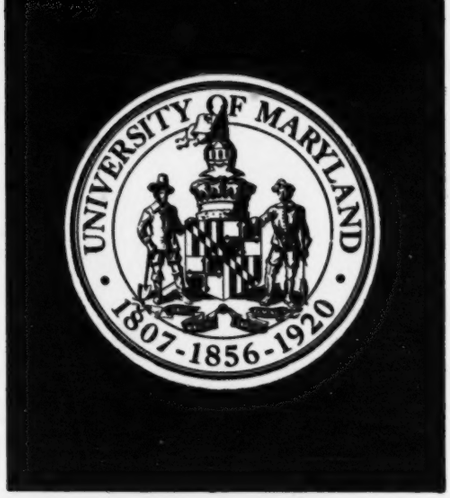

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FINAL REPORT

MANAGEMENT SEMINAR SERIES I AND II
for
NURSING HOME ADMINISTRATORS
March - July, 1969

UNIVERSITY COLLEGE
UNIVERSITY OF MARYLAND
College Park, Maryland
20740

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FINAL NARRATIVE REPORT

MANAGEMENT SEMINAR SERIES I AND II

FOR

NURSING HOME ADMINISTRATORS

MARCH - JULY, 1969

CONDUCTED BY:

OFFICE OF PROGRAMS FOR EXECUTIVE DEVELOPMENT
CONFERENCES AND INSTITUTES DIVISION
UNIVERSITY COLLEGE
UNIVERSITY OF MARYLAND

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NOVEMBER, 1969

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A. DESCRIPTION OF THE PROJECT

The 1969 Management Seminar Series for Nursing Home Administrators was a creative approach to the organizational management concerns of nursing home administrators. It was specially tailored to their needs for managerial skills in the field of geriatric care, while at the same time preparing them for licensure.

A total of 84 hours of instruction was included in each of two Series of four seminars of three days each. The first Series began in March and finished in June; the second Series began in April and ended in July. The second Series contained a slight revision of course material and faculty based upon the experience of the first. The instruction included many of the recommendations of the President's Council on Nursing Home Administrators. The University of Maryland granted a Certificate of Participation to 58 participants of the Series.

The Management Seminar Series for Nursing Home Administrators was developed by the Office of Programs for Executive Development of the Conferences and Institutes Division, University of Maryland, for the Maryland D. C. Nursing Home Association. The Series was developed in cooperation with a Planning Committee representing the Maryland Nursing Home Association, The Maryland State Department of Health, and the University of Maryland.

B. PROJECT PHASES

The inception of the idea that the University of Maryland might develop a broad, comprehensive management development training program for nursing home administrators in the State of Maryland began in September of 1968. At that time, initial discussions were carried on between members of the Educational Committee of the Maryland - D. C. Nursing Home Association and staff members of the Office of Programs for Executive Development (OED) of the Conferences and Institutes Division (C & I), University College, University of Maryland.

The impetus for the project was four-fold. First, it was anticipated that Federal legislation (Public Law 90-248) requiring that all nursing home administrators must participate in programs of training and instruction in their field as part of the necessary qualifications to function as a nursing home administrator would soon be implemented in Maryland. Secondly, Federal legislation would also require administrators to possess a professional license in nursing home administration in order to pursue a career in that field. Third, the Maryland - D. C. Nursing Home Association had recognized a need to begin to establish a vehicle which would help administrators meet the necessary requirements for licensure (i.e., a required course of study). Fourth, it was felt that a program of continuing education in management training was necessary to the professional development of all nursing home administrators.

A Proposal for a "Management Seminar for Nursing Home Administrators" was submitted to the Association on October 3, 1968 by the Office of Programs for Executive Development. This Proposal included the following:

1. Description of the Proposed Management Seminar Series
2. Project Development
   a. Preliminary Study
   b. Pilot Seminar Development
3. Rationale for the Management Seminar Series
4. Method of Instruction
5. Faculty
6. Tentative Project Goals and Objectives
7. Content and Emphasis of the Management Seminar Series
   a. Overview of the Project
   b. Basic Elements of the Project
8. Scheduling for the Pilot Seminar
9. Tentative Calendar
10. Estimated Budget
11. Relationship of Maryland Nursing Home Association to Office of Programs for Executive Development

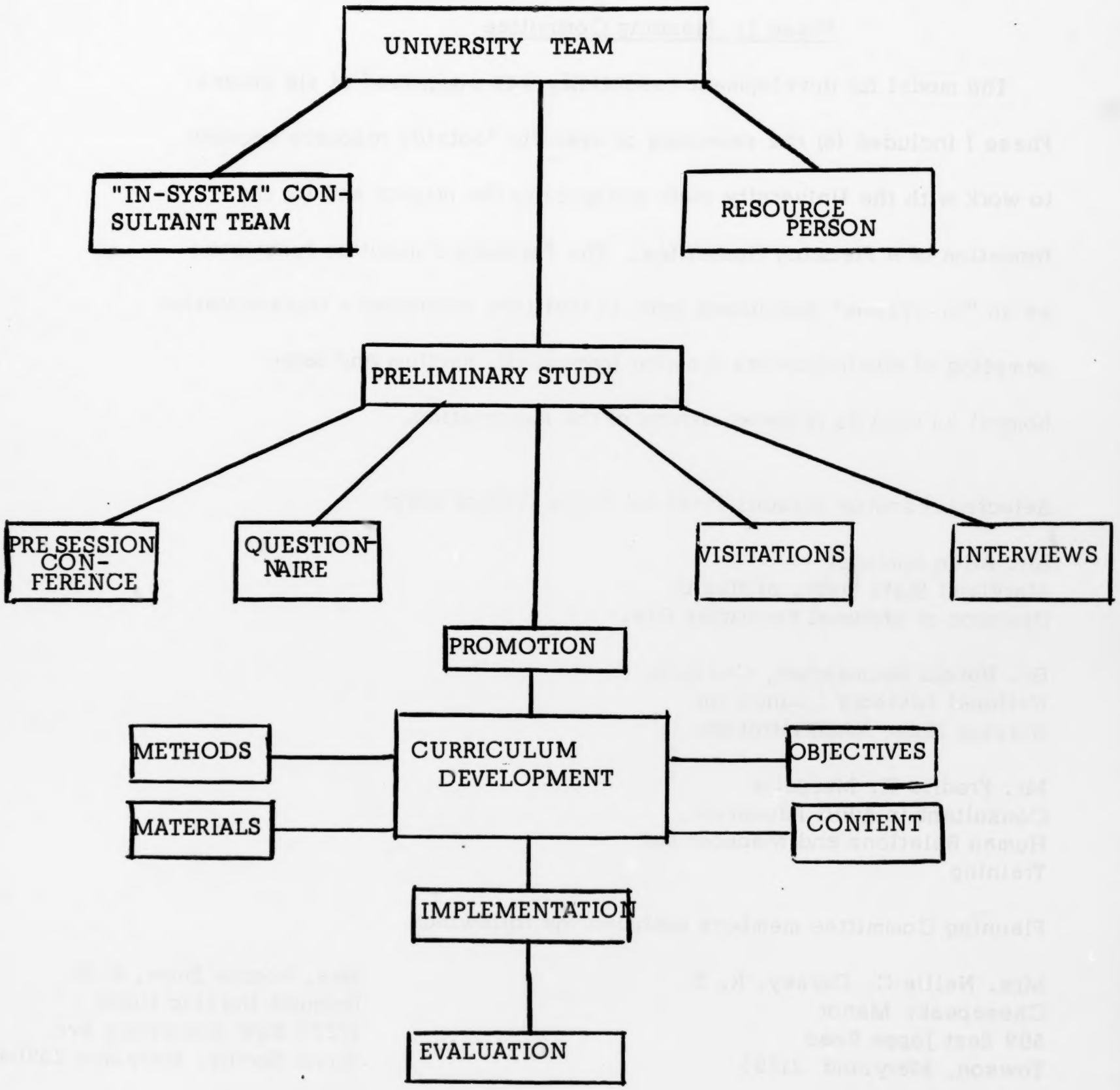
Development of the project formally began on November 18, 1968 after a Letter of Agreement from the University which specified the terms under which the Association would underwrite the cost of program development had been accepted by the Association.

II. Development of the Project

The charge to OED was to tailor a management training program to the specific and unique needs of nursing home administrators in the State of Maryland. OED's method of "tailoring" was to utilize an "in-system" consultant team, a University staff team, and selected outside resource persons. The focus of the project was normative, as the project was built on the data gathered from administrators throughout the State. A needs diagnosis was derived from these data which indicated normative levels of current management skills in operation. Thus, the curriculum developed was broadly based in that it emerged out of needs which were representative of all the administrators throughout Maryland. These procedures indicated certain prescribed levels of competence in management which the project aimed to achieve in its participants. These competency levels involved both the acquisition of knowledge and the improvement of specific skills (primarily in the area of supervision and personnel management).

The model for development included six phases which are outlined in the flow chart to be found on the next page.

SIX PHASE DEVELOPMENT MODEL



Phase I: Planning Committee

The model for development essentially was comprised of six stages. Phase I included (a) the selecting of specific "outside resource persons to work with the University staff assigned to the project and (b) the formation of a Planning Committee. The Planning Committee functioned as an "in-system" consultant team in that they instituted a representative sampling of administrators (coming from small, medium and large homes) as well as representatives of the Association.

Selected resource persons involved in the project were:

Mr. Allen Antisdel
Maryland State Dept. of Health
Division of Medical Facilities Div.

Dr. Harold Baumgarten, Chairman
National Advisory Council on
Nursing Home Administrators

Mr. Fredric H. Margolis
Consultant in Adult Education,
Human Relations and Management
Training

Planning Committee members included the following:

Mrs. Nellie C. Dorsey, R. N.
Chesapeake Manor
509 East Joppa Road
Towson, Maryland 21093

Mrs. Mona Kohn
Administrative Assistant
Maryland Nursing Home Association
Kensington, Maryland 20795

Mrs. Bonnie Snow, R.N.
Belmont Nursing Home
17220 New Hampshire Ave.
Silver Spring, Maryland 20904

Mrs. Martha Tarutis, R.N.
Longview Nursing Home
128 North Main Street
Manchester, Maryland 21102

Mr. Herbert L. Marschark
Marylander Home of Rest
Germantown, Maryland 20767

Mr. Harvey Wertlieb
Randolph Hills
Nursing Home
4011 Randolph Rd.
Wheaton, Md. 20902

Mr. Sydney M. Polakoff
The Westwood
5101 Ridgefield Road
Bethesda, Maryland 20016

Members of the University Team included:

Dr. Donald A. Deppe, Director
Conferences and Institutes Division

Mr. John H. Buskey, Assistant Director
Conferences and Institutes Division

Mr. R. Ray McCain, Assistant Director
Conferences & Institutes Division, in charge of
Office of Programs for Executive Development

Miss Jan Peck, Coordinator
Conferences and Institutes Division

PHASE II: PRELIMINARY STUDY

Phase II focused on a preliminary study of nursing homes and their management in the State of Maryland. This phase had four components.

A. A questionnaire Survey of Nursing Home Administrators

B. Interviews with administrators

C. Visitation of nursing homes

D. A Pre-session Data-gathering conference with randomly selected nursing home administrators

A. The questionnaire Survey of Nursing Home Administrators was mailed to approximately 150 nursing homes throughout the State. Of that number, 45 were returned. The questionnaire focused on three areas. First, it had the administrators self-classify whether they viewed their homes as falling into the categories of small, medium, or large. Administrators who classified their homes as small had a home that averaged 30 beds; those who rated their homes of medium size averaged 72 beds; and those who considered themselves large averaged 174 beds. Secondly, it obtained data on specific problems in management. The most pressing problems that emerged from the questionnaires concerned supervision, management of personnel, and inter-departmental coordination of services, as well as financial and budgetary controls. Thirdly, the questionnaire sought data on the expectations of administrators for the project.

Expectations for the Management Seminar Series seemed to indicate that administrators anticipated a broad-based management training program. A copy of the questionnaire and the data gathered from it are included in Part I of the Appendix.

B. Interviews with many administrators were constantly being carried out during the development period. The purpose of their interviews was to check verbally the accuracy of the questionnaires and to help further educate the University staff in terms of determining the current state of the art in nursing home administration.

C. Visitations were conducted by the University staff and a member of the Association. The purpose of these visitations was to acquaint the University staff with various kinds of nursing home facilities as well as to gather additional on-site data as to specific concerns and operational problems of management.

D. A Pre-Session Conference of approximately 15 randomly selected administrators was conducted on January 18, 1969. This conference had two purposes: (1) The University staff attempted to test the responsiveness of the participants to an experienced-based learning methodology. (2) The conference was an additional data-gathering device.

The participants reacted very favorably to the experienced-based learning methods utilized during the session. As a result of this experience, the University staff decided to minimize the use of a lecture-discussion method and instead, to rely more heavily on a participative design which

utilized a series of short "lecturettes" or "theory inputs" followed by learning exercises which focused on the total involvement of the learner.

The conference also gathered data as to the personal qualities and skills which would be most desirous for an administrator to have. These focused primarily on the areas of decision-making, problem-solving, supervisory practice, and empathy. In addition to this, specific areas of content (knowledge to be acquired) and skills (in management) were outlined as being necessary for administrators to function successfully. Both of these areas were similar to those listed on the questionnaire survey. Such things as team-building, and in-service training were heavily stressed. Emphasis was also placed on supervision and personal management.

See Appendix Part II for the Pre-Session design and data.

Phase III: Promotion

In February of 1969, a brochure was mailed to nursing homes throughout the State of Maryland. This mailing, along with publicity from the Association, were the primary forms of promotion.

Two Series were advertised. It was hoped that 40 participants would attend each Series or that a total of 80 would participate. Actually, there were 40 registrants for Series I and 18 for Series II.

The dates of the Series were as follows:

Series I		Series II	
Seminar I:	March 23-26, 1969	Seminar I:	April 7-10, 1969
Seminar II:	April 13-16, 1969	Seminar II:	May 4-7, 1969
Seminar III:	May 4-7, 1969	Seminar III:	June 1-4, 1969
Seminar IV:	June 1-4, 1969	Seminar IV:	July 13-16, 1969

Tuition for each Series was $460.00 for members of the Association and $560 for non-members.

Phase IV: Curriculum Development

A. Objectives

As a result of data gathered from the Preliminary study, the Project objectives were reconsidered and revised. The original objectives were as follows:

1. To increase participants' knowledge of general concepts of management and principles of organization.
2. To guide participants in clarifying their roles and objectives as administrators within the organization as they relate to the quality of patient care.
3. To improve participants' interpersonal competence in motivating and leading subordinates in the accomplishment of tasks.
4. To develop participants' knowledge of the principles of institutional management (organizing, planning, leading and directing, measuring and controlling).
5. To guide the participants in (1) identifying specific problems in nursing home administration; and (2) in formulating proposals for change and improvement in these areas.

In the refinement of objectives, the general goal of focusing on the organizational problems in nursing home management by working on general concepts of management and principles of organization was retained. Specific goals for each of the four seminars were developed as follows:

Seminar I: Planning, Overview, General Concepts

1. To analyze the issues of cooperation - competition among departments within the home.

2. To explore the effect of local goal versus subordinate goal upon employees and among departments.

3. To guide participants in clarifying their roles as administrators by gaining a greater understanding of their personal leadership style and its effect on others.

4. To increase participants skill in giving and receiving help (The Consultation Process).

5. To increase participant's skill in problem-analysis and decision-making.

6. To demonstrate a method of learning and teaching others that could be used in in-service training.

7. To uncover specific problems in nursing home administration as a further check on the appropriateness of the design of the next three Seminars.

Seminar II: Leading and directing

1. To understand the influence of the organizational climate on employee-patient morale and motivation.

2. To become familiar with the five styles of leadership (tell, sell, consult, join, delegate) and their implications in supervisory practice.

3. To explore the practice of appraisal systems in the development of performance standards.

4. To understand the faces, factors and purposes in the delegation of responsibility and authority.

5. To improve participants skills in motivating and leading subordinates in the accomplishment of tasks.

6. To become aware of the need for personal self-development and organization self-renewal.

Seminar III: Measuring and controlling

1. To provide information on the laws and regulations affecting nursing homes.

2. To increase skills in budgeting, purchasing and cost control.

3. To determine ways to improve the relationship between the nursing home and the community.

Seminar IV: Integration

1. To reinforce the knowledge and skills acquired during the previous three seminars.

2. To develop specific strategies for change and improvement within the nursing home.

B. Methodology

Methods of participative learning were selected over passive learning. Such methods were selected on the basis of the following assumptions of the ways adults learn:

1. Significant learning takes place when the subject matter is perceived by the learner as immediately relevant to his own purposes.

   Method: Participants were usually asked to build a "learning agenda" at the start of each session. This was to involve maximum committment of the participants in the learning tasks and to validate further the relevancy of the planned curriculum.

2. Much significant learning is acquired through doing.

   Method: Learners were placed in many experiential confrontations with specific nursing home operational problems, ethical and professional problems and personal issues.

3. Learning is faciliated when learners participate responsibly in the learning process.

   Method: Approximately 60 - 70% of the time learners were working in small groups which challenged them to discover their own and others special learning resources; in which they often had to formulate their own course of action and deal with the consequences of each of these choices. Thus, the faculty acted as a flexible resource to be utilized by the learners, relying upon the individual learners themselves to recognize their own motivations and purposes as the force behind their own learning.

4. Independence, self-reliance and creativity are all facilitated when self-criticism and self-evaluation are the norms and evaluation by others is of lesser importance.

   Method: No examinations or grades were given. Learners were encouraged constantly to evaluate their own progress in learning and to change and adapt their personal learning agendas to their own growth.

C. Materials

In addition to specific materials distributed during the Seminar sessions, two basic resources, a text and a reading manual, were utilized.

Text

Harold J. Leavitt's Managerial Psychology. Second edition, University of Chicago Press, Chicago, Illinois, 1968.

The Leavitt text was selected because it focuses primarily upon human problems in supervision and general management. It explores the individual and his behavior; problems of influence and authority; communication, independence and conformity, conflict and competition in work groupings; and the nature of business organizations with attention to the problems which occur in large organizations.

Reading Manual

Prepared by Janice R. Peck, Selected Reading and Resources: Management Seminar Series in Nursing Home Administration

The manual is a collection of articles and readings which were selected according to the following criteria:

1. Bearing in mind that participants come from a variety of backgrounds and educational experiences, every effort was being made to choose readings which would correlate and reinforce the learnings during

the Seminars so that participants with less knowledge of a behavioral science approach to management would learn as rapidly as possible.

2. An effort was made to choose readings with concepts that are consensual rather than controversial among management specialists.

3. The effort was to develop participant's critical abilities with respect to a relatively few standard ideas and concepts and to rely upon instruction during the Seminars to extend them to a greater variety of specialized areas.

The following articles were included in the manual in this order:

Part I

1. Rensis Libert. "A Comparative View of Organizations." Reproduced by special permission from Libert's New Patterns of Management (McGraw-Hill, New York), Copyright 1962, pp. 222-248. Shows the comparative difference among management systems.

2. Jan Peck, "The Managerial Grid - Theories of Management." A synposis of the work done by Robert R. Blake and Jane Siggley Marton, it summarizes management practices and identifies five kinds of management behaviors based on concern for production.

3. "Dilemmas of Leadership." Reproduced by special permission from the Reading Book: Twenty-Second Annual Laboratories in Human Relations Training, 1968-69, published by NTL Institute for Applied Behavioral Science, associated with the NEA, 48-51. Examines the continuum of leadership styles behavior.

4. "Outlines of Nursing Home Administration." Reprinted from The Light, Volume XVI - No. 1, published by the Illinois Nursing Home Assocation, January, 1969. Outlines the multi-faceted role of homes and administrators along several dimensions.

5. "The Administrators Responsibility in Patient Care"
Outlines the professional and personal skills needed in nursing home administration.

6. Dr. Robert Chin. "Role and Role Conflict."
An unpublished article which was reprinted with author's permission. Defines role as "the behaviors related to a position within a system of positions" and looks at some of the ways role conflict arises and can be resolved.

7. Jan Peck, "Personnel Research Questionnaire"
This is a sample instrument devised to determine workers satisfaction with management.

8. "Nursing Home Administration: Fact Sheet"
Reprinted from the Department of Health, Education, Welfare, Social and Rehabilitation Service Administration. This is a statement on licensure from DHEW.

Part II

1. Leonard Nadler, "The Organization as a Micro-Culture."
An unpublished article reprinted with permission from the author. This is a concept of micro-cultural behavior developed by Dr. Nadler.

2. Leslie This, "The Leader Looks at Personal Communication."
Leadership Resources Pamphlet, No. 7. This pamphlet provides a background on effective inter-personal communications.

3. The Johari Window.
This is a guide to a better understanding of relationships between people.

4. "Feedback and the Helping Relationships."
Reproduced by special permission from the Reading Book: Twenty Second Annual Laboratories in Human Relations Training, 1968-69, published by the NTL Institute for Applied Behavioral Science, associated with the NEA, 44-47. This is a guide to the giving and receiving of help.

5. "Communication"

   This is a guide to a better understanding of relationships between people. States the need to be aware of yourself, your own behavior-attitudes, and their effect on others.

6. H. Curtis Mial, "Group Problem-Solving and Decision-Making." An unpublished article reprinted with permission of the author. It focuses on the role of the leader of a group in the process of solving problems and making decisions.

7. University of Chicago Industrial Relations Center's Organization Survey.
   This is a pamphlet designed as an aid to management in improving its proficiency in problem analysis, operations and action.

D. Content

The content for each of the Seminars was based upon the Seminar objectives and is outlined as follows:

Seminar I

I. Climate-building and developing a way of working together.

II. Responsibility-Authority Delegation

   A. Meaning of Responsibility

   B. Skills of Management

      (1) Human skills
      (2) Technical skills
      (3) Conceptual skills

   C. Delegation of Authority

      (1) Opportunities
      (2) Pitfalls

   D. Use of Staff

   E. Problems of Multiple Responsibility

      (1) Local-goal versus subordinate-goal
      (2) Cooperation-competition

III. Centralization and Decentralization

IV. Integrating Management Styles with Organizational Development Control.

A. Influence of management leadership in promoting a more effective organization structure.

B. Identifying leadership behavior most conducive to dynamic organization performance.

V. The Process of Consultation in Management

A. The execution of control over employees

B. Giving help

C. Receiving help

VI. Communication in Management

A. Transmission of facts and feelings

B. Empathetic listening

C. Conveying meaning to others

D. Upward and downward communication

E. Formal and informal communication channels

F. Making use of the grapevine

VII. Problem Identification in Management

A. Problem-analysis

B. Decision-making

C. Model building

VIII. Organizational Climate

A. Resident and patient care planning

B. Activity programming

(1) Patient participation
(2) Recreation

C. Environmental Adjustment

(1) Inter-relationships between patient and

a. patient
b. staff
c. family
d. administrator
e. management

(2) Rehabilitation and restorative activities

Methods:

management games	fantasy
small task groups	discussion groups
critical incident	idea inventory
role play	force field analysis
lecturettes	

Seminar II

I. Climate-building

A. Problem identification
B. Linkage to previous Seminar

II. Organization as a micro-culture

A. Concept of micro-culture
B. Cultural behavior

III. Managerial Leadership

A. Characteristics, impact and significance of different leadership approaches.

(1) Telling
(2) Selling (persuading)
(3) Consulting
(4) Joining
(5) Delegating

B. Making the manager's leadership pattern in harmony with organization needs.

C. Developing voluntary cooperation

(1) Structural prerequisites to voluntary cooperation
(2) Guides for executive behavior

D. Use of power

IV. Employee Appraisal

A. Purposes of an appraisal system

B. Historical development

C. Types of appraisal systems

(1) appraisal by objective
(2) appraisal by subordinates
(3) appraisal by performance standards

D. Practice in the development of performance standards.

V. Motivation

A. Historical Development.

B. Process of motivation.

C. Models of motivation current in research and organization practice.

D. Application of motivation models to nursing home employees.

VI. Delegation

A. Definitions of delegation in practice and in research.

B. Forces/factors affecting delegation.

C. Purposes/ends of delegation.

D. Responsibility, authority, and accountability.

VII. Communication

A. Verbal

B. Non-verbal

C. Perception formation

D. Communication networks

E. Forces within the organization influencing the communication process.

F. Barriers to communication.

G. Johari window concept.

VIII. Self-Development

A. Forces/factors influencing personal and organizational lives.

B. Factors critical to self-development.

C. Tools available for self-development.

IX. Our World Today

A. Factors currently influencing nursing homes.

B. Predictions of factors that will influence nursing homes in the future.

C. Ways in which these factors will influence nursing homes and administrators self-development and organization renewal.

Methods:

discussion groups

task groups

lecture

panel

film

critical incident

problem analysis

Seminar III

This seminar was arranged at the request of participants who asked that members of the Maryland State Department of Health be available in at least one of the seminars. The following is a list of the people and topics covered during this seminar in the order of presentation.

1. Fredric H. Margolis

   A. Linkage with previous seminars.

   B. Preparation for the effective use of resource people.

2. Mr. James C. Robertson
   State of Maryland Fire Marshal

   A. Current Fire Regulations

3. Mr. Allen Antisdel
   Planner, Division of Medical Facilities Development
   State Department of Health

   A. Planning Procedures, Methods, and Purposes of the Annual "Medical Facilities Survey and Plan" for the "Hill-Burton" Program.

   B. Requirements and Procedure for applications for Federal and State Aid Construction Projects.

   C. State Regulations and Procedures for Submission and Review of Non-grant Construction Projects.

4. Mrs. Virginia Maxwell
   Coordinator of Institutions and Medical Care Facilities, Montgomery County Health Department

   A. "Improving Patient Care Through Standards, Licensure, and Accreditation."

5. Mr. Ralph Taurtes
   Retired, Maryland State Department of Health

   A. "Reflections and Implications of State Rules and Regulations"

6. Mr. Irving Shulbank
   Mr. Maurice G. Rosenfeld
   Mr. Roy H. Hartman

   A. "Measuring and Controlling Functions of Management"

7. Dr. Donald A. Ehat
   Consultant in Management

   A. "Application and Consultation"

8. Dr. Beryce W. Mac Lennan
   Chief, Consultation and Community
   Liaison, Mental Health Study Center,
   National Institute of Mental Health

   A. "Community Inter-relationships"

Seminar III: Content

I. Overview: Measuring and Controlling Functions of Management

   What is Budgeting?

   What is Control?

   What is Budgeting for Control?

   Operating Budgets

   Cash Budgets

   Tax-Based Relationship

II. Operating Budget:

   A. Steps in Preparation of Budgets

(1) Chart of Accounts
(2) Fixed and Variable Costs
(3) Review of History
(4) Anticipation of Changes in Costs
(5) Anticipated Occupancy Level
(6) Patient-Day Concept - Costs

B. Summary

III. Cash Budgets - Working Capital Requirements:

A. Equipment Purchases and Debt Retirement Requirements

B. Cash Flow Projection Re: Net Income and Spendable Income

C. Income Taxes - Recent Changes in Prepayment Requirements

D. Medicare Interim Rate Determination and Advance

IV. Control:

A. Comparison of Budget to Actural

B. Search for and Analysis of Variances

C. Correction of Problems
Delegation of Responsibility and Isolation of Problem Areas

D. Unavoidable and Avoidable Cost Increases and their Effect

E. Feedback--Last Period Actual to Future Budget

V. Projections:

A. Long-term Budget Planning for Expansion of Existing Facilities

B. Budgeting Start-up Costs and Cost of:
(1) Land
(2) Construction
(3) Equipment

C. Available Financing

D. Net Cash Requirements

E. Working Capital Requirements to Open New Facility

F. Projections of Operations for First Two-Year Critical Period and Cash Requirements

G. Depreciation

VI. Exchange of information regarding costs through the Maryland Nursing Home Association and publishing through a clearing group of unlabeled comparative statistics.

VII. Utilization of comparative data in preparing budgets and establishing rates.

VIII. Overview: Community Inter-relationships

A. Community medical care and service resources

B. Other community resources

(1) religion
(2) schools
(3) service agencies
(d) government agencies

C. Community and area-wide planning

Seminar IV

I. Climate-building and linkage to previous Seminars.

II. Review of previous seminars.

III. Organization Concepts and Departmentalization

A. Social-psychological implication of organization

(1) Motivation
(2) Attitudes
(3) Communications
(4) Organizational Climate
(5) Organization defined in terms of group and individual behavior norms

(6) The theories affecting individual work
(7) Group interrelationships in context with the organizations

B. Training of Personnel

(1) Sensitizing employees to patient needs
(2) In-service training

IV. Developing action strategies for back-home application

V. Planning premises and constraints

A. Economic

B. Federal and State Controls and fiscal action

C. Long-Range and Short-Range planning

D. Planning for growth

Phase V: Implementation

A. Faculty Guide

In order to acquaint faculty with the project and to assure a smooth transition from seminar to seminar, the University staff developed a Faculty Guide. This consisted of a general overview of the total project, the objectives for each seminar, and the content outlines.

In addition to the Guide, each instructor involved in the seminars had at least one period of consultation from the University staff. This was to assist faculty in the proper development of his materials.

B. Faculty involved in the Seminars included the following:

Dr. Donald M. Ehat

Dr. Ehat is a consultant in organizational development specializing in organizational problem-solving, supervisory training, leadership development, and cross-cultural communication training. His doctorate degree in Adult and Higher Education is from the Graduate School of Education at Boston University. Dr. Ehat was Director of Informal Education and Leadership Development at Boston University as well as a Fellow of the Human Relations Center there.

Dr. Ehat has been the Visiting Assistant Professorial Lecturer in Management Science and Adult Education at George Washington University. Prior to becoming a free-lance consultant, he was Director

of Community Services at Leadership Resources, Inc. where he developed training programs for municipal governments, social service agencies, and other types of government and private associations.

His varied experiences have included work for the U. S. Department of Defense, Personnel Division; the Agency for International Development; the George Washington University Hospital; the Office of Economic Opportunity; the International Association of Chiefs of Police and many others.

Mr. Fredric H. Margolis

Mr. Margolis is a free-lance consultant specializing in management training, adult education training and organizational development. Within the next few months he will receive his doctorate degree from the Graduate School of Education at Boston University in adult education and human relations training.

Formerly with the Management Development Division of the National Broadcasting Company, New York City, Mr. Margolis was responsible for developing the management training program at NBC in conjunction with Radio Corporation of America. This included manager appraisal systems and training managers as to the relationship between managerial style and subordinate development.

Mr. Margolis is the former Executive Director of the Southeastern Chapter of the Massachusetts Heart Association. He has taught courses human relations training for both the Graduate School of Psychology and the Graduate School of Education at Boston University. He worked closely with the Office of Programs for Executive Development in the development of the Management Seminar Series.

Dr. Leonard Nadler

Dr. Nadler is Associate Professor of Adult Education and Employee Development in the School of Education of the George Washington University. He was also President of Leadership Resources, Inc. Dr. Nadler holds a Bachelor of Business Administration (Accounting) and a Master of Science in Business Education from the City College of New York. His docorate is in educational administration from Teachers College, Columbia University.

Prior to his present positions, Dr. Nadler was a member of the President's Task Force on the War Against Poverty, and a Training Officer with the Agency for International Development in Japan and Ethiopia. Before going overseas he was Chief, Training Division, Department of Public Welfare, Commonwealth of Pennsylvania. In this position he coordinated training for the department including the medical hospitals and mental institutions.

Earlier, in New York State, he was Chief of Medical Defense Training, Department of Health, and a Training Supervisor, Department of Civil Service. In the latter position he was responsible for developing supervisory and administrative training for employees in the state hospitals.

In 1957, Dr. Nadler organized the special interest section on Hospital Training in the American Society for Training and Development. He was subsequently elected as the Chairman of this section until he left for overseas. During 1958-1959 the magazine The Modern Hospital published ten articles authored by Dr. Nadler on supervisory training in hospitals. More recently his articles have appeared in numerous professional journals including Training and Development Journal. He is listed in Who's Who in American Education.

Mr. Leslie E. This

Mr. This is a Vice President of Leadership Resources, Inc. He received his A. B. from Baylor University and took his graduate work at Cincinnati and Indiana Universities. Before joining Leadership Resources, Inc., he was responsible for management and supervisory training for scientists in the Agricultural Research Service of the U. S. Department of Agriculture. He has consulted

and trained for various organizations, such as Westinghouse, Montgomery Ward, National Security Agency, Goddard Space Flight Center, IBM Corporation, and public and private utilities. He has written extensively on management and related subjects for various professional publications.

Mr. This is affiliated with a number of professional groups, among them the American Society for Training and Development and the Academy of Management.

Mrs. Carol Heine

Mrs. Heine is a free-lance consultant specializing in adult education and organizational development. She will receive her doctorate in adult education from the Graduate School of Education at Boston University in 1970.

Mrs. Heine has worked in a variety of community as well as industrial settings and has specialized in the field of organizational consultation.

Other resource people included:

1. Mr. James C. Robertson
   Fire Marshal, State of Maryland
2. Mrs. Virginia Maxwell
   Coordinator of Institutions and Medical Care Facilities
   Montgomery County Health Department

3. Mr. Ralph Tautis, Retired
   Maryland State Department of Health

4. Mr. Irving Shulbank
5. Mr. Maurice G. Rosenfeld
6. Mr. Roy H. Hartman
   Accounting firm of Shulbank, Rosenfeld & Hartman
   Baltimore, Maryland

7. Dr. Beryce W. MacLennan, Chief
   Consultation & Community Liaison
   Mental Health Study Center
   National Institute of Mental Health

Phase VI: Evaluation

Three of the Seminars were evaluated with a standard evaluation instrument. The third Seminar of Series I and the second Seminar of Series II were evaluated with a separate form. In the combined Seminar, the primary learning methodology used was that of the lecture. Since the other three were experientially-based, it was felt that a separate evaluation form (found in Part IV of the Appendix) would provide more accurate feedback from the combined Seminar.

The evaluations indicated that participants generally rated the seminars good or excellent. The range of presentation and discussion was generally rated as "just enough" although there was some indication that a bit more time spent on presentation was desirable. Participants strongly indicated that they would do things differently "back-home on-the-job" as a result of insights gained at the Seminars. There was strong opinion that all of the Seminars "provided me with the kind of experience I can apply to my own situation."

The combined Seminar (Seminar III, Series I and Seminar II, Series II) was the least helpful. This was primarily an information dissemination Seminar which utilized the lecture method almost exclusively. The resource people used were not the most helpful and participants reacted somewhat negatively to many of them.

The evaluations, both verbal and written indicate that the methods of teaching and learning utilized were highly appropriate. The Seminars, on the whole, effectively blended the affective and the cognitive in a way that was reinforcing and enhancing to the learning process.

C. PROPOSED CURRICULUM RE-DEVELOPMENT

On the bases of Series I and II (1969), it is proposed that the curriculum be revised to include 112 hours of instruction. This might be allocated into four Seminars of 3 1/2 days each or a total of 28 instructional hours per Seminar.

Seminar I

A. Objectives

1. To understand the concepts of organizational health and self-renewal.
2. To appraise the effectiveness of participants own organizations in terms of (a) goal structure and (b) problem-solving adequacy.
3. To analyze the issues of cooperation - competition among departments within the nursing home.
4. To explore the effect of local-goal versus subordinate-goal upon employees and among departments.
5. To increase participants skill in problem-analysis and decision-making.

In addition to the general goal of seeking to improve the managerial proficiency of nursing home administrator, the following two objectives should be made explicit in each Seminar.

1. To demonstrate methods of learning and teaching others as appropriate models for inservice training.
2. To uncover current specific problems and issues that are of concern to participants to check the appropriateness of the design for the following seminars.

B. Content Outline

2 hours I. Climate-building

8 hours II. Concepts of organizational health

- A. Measures of organizational effectiveness
- B. Organizational effectiveness vs. current goals
- C. Goals-means-discrepancies in organizations
- D. Problem-solving and consensual decision-making

5 hours III. Cooperation / Competition

- A. Dilemnas of responsibility, authority, and accountability
- B. Authority Relationship

1. Staff authority
2. Placing service and staff units in a structure
3. When to use staff

C. Centralization Versus De-centralization

5 hours IV. Dynamics of Organizing

A. Growth patterns in the organization
B. Interaction of people and structure
C. Effect of economic function on structure

5 hours V. Organizational Climate

A. Organization as a micro-culture
B. Resident and patient care planning
C. Activity Programming

1. Patient participation
2. Recreation

D. Environmental Adjustment

1. Inter-relationships between patient and
   a. patient
   b. staff
   c. family
   d. administrator
   e. management

2. Rehabilitation and restorative services

VI. Departmental Organization and Management

A. Establishment of departmental and unit objectives
B. Reporting and accountability of individual departments to administrator

C. Criteria for departmental evaluation (ie. nursing, food service, therapeutic services, maintenance, housekeeping)

C. Suggested Resources:

Bennis, Changing Organizations,

McGregor, Human Side of Enterprise

Lawrence & Horsch, Organization & Environment

Leavitt, Managerial Psychology

Leavitt, "Unhuman Organizations", Harvard Business Review

Likert, The Human Organization

Tanneribaun, Social Psychology and The Work Organization

D. Suggested Faculty:

Dr. Douglas R. Bunker
Professor
Suny - Buffalo
P. O. Box 392
Clarence, New York 14031

Dr. Donald Ehat
Organizational Development Associates

Mr. Roger Harrison
NTL Institute Affiliate

Mr. Fredric H. Margolis
Consultant in Management Training

Dr. Leonard Nadler
Department of Adult Education
George Washington University

Dr. Barry Oshry
Department of Organizational Development
Boston College

Dr. John Thomas
Assistant Professor
Policy Sciences
Suny - Buffalo, N. Y.
4224 Ridge Lea
Buffalo, New York 14226

Seminar II

A. Objectives

1. To become familiar with the styles of managerial leadership and their implications in supervisory practice.
2. To explore the practice of appraisal systems in the development of performance standards.
3. To understand the forces, factors and purposes in the delegation of responsibility and authority.
4. To improve participants skills in motivating and leading subordinates in the accomplishment of tasks.
5. To increase participants awareness of the importance and need for continuous self-development.

B. Content Outline

2 hours — I. Climate-building

4 hours — II. Managerial Leadership

A. Characteristics, impact and significance of different leadership approaches

1. Telling
2. Selling
3. Consulting
4. Joining
5. Delegating

B. Organizational authority based on role vs. organizational authority based on task.

C. Developing voluntary cooperation

1. Interdependence between superior and subordinate
2. Structural prerequisites to voluntary cooperation

D. Integration of individual vs. organizational needs.

E. Competence-based power (Leavitt).

3 hours — III. Employee Appraisal

A. Purposes of an appraisal system

B. Types of appraisal systems

1. Appraisal by objective
2. Appraisal by subordinates
3. Appraisal by performance standards

5 hours

IV. Communication

A. Verbal

B. Non-verbal

C. Perception formation

D. Communication nets in work groups

E. Forces within the organization influencing the communication process

1. Barriers to communication
2. Jo-Hari window concept

F. Independence and Conformity as group norms

5 hours

V. Self-Development

A. Forces/factors influencing personal and organizational lives

B. Factors critical to self-development

C. Tools available for self development

5 hours

VI. Motivation

A. Process of motivation

B. Models of motivation current in research and organizational practice (ie. Hertzberg, etc.)

C. Application of motivation models to nursing home employees

4 hours VII. Training of personnel

A. Sensitivity training of employees to patient needs

B. In-service training

C. The Consultations Process

C. Suggested Resources:

Beehr, The Appraisal of Job Performance
Occassional Papers, University of Chicago
Industrial Relations Center, 1968.

Bass, Leadership, Psychology and Organizational Behavior

Browner, The Power to See Ourselves, Harvard Business Review Nov. - Dec. 1964

Drucker, Management by Objective

Graves, Deterioration of Work Standards, Harvard Business Review Sept. - Oct. 1966

Herzberg, One More Time: How Do You Motivate Employees? Harvard Business Review, Jan.-Feb.1968

Knowles & Saxberg, Human Relations and The Nature of Man Harvard Business Review, March - April, 1967

Leavitt, Managerial Psychology

Likert, New Patterns of Management

McGregor, Human Side of Enterprise

Meyers, Conditions for Manager Motivation Harvard Business Review, Jan. - Feb. 1966

Tannenbaum, Weschler & Massarick, Leadership and Organization

This, The Leader Looks at Personal Communication

D. Suggested Faculty

Dr. Robert Alying
NTL Institute Affiliate

Dr. Donald A. Ehat
Organizational Development Associates

Dr. Robert Derbyshire
University of Maryland
Psychiatric Insitute

Mr. Fredric H. Margolis
Consultant in Management Training

Dr. Cyril Mill
Program Director
NTL Institute

Dr. Leonard Nadler
Department of Adult Education
George Washington University

Mr. Leslie This
Leadership Resources, Inc.

Seminar III

A. Objectives

1. To provide up-to-date information on the laws regulations affecting nursing homes.

2. To increase skills in budgetary controlling.

3. To become familiar with the legal standards of health and safety.

4. To understand the administrators responsibility in safety patient care.

B. Content

2 hours I. Climate-building

II. Standards of environmental health and safety

A. Hygiene & sanitation

B. Communicable diseases

C. Management of isolation

D. Total environment (noise, color, orientation, simulation, etc.)

E. Nutrition

a. standards for judging food quality, cost factors, food laws
b. Working with a dietitian and food service supervision

4 hours III. Psychology of patient care

A. Anxiety

B. Depression

C. Drugs and their effect

D. Motivation

6 hours IV. Principles of Medical Care

A. Anatomy

B. Psychology

C. Disease recognition

D. Disease processes

E. Aging Processes

F. Medical Terminology

G. Utilization Review

H. Patient oventations and physician relationships

3 hours VI. Budgetary Controlling

A. Budgeting as a management tool.

B. Fundamental Budgeting Considerations

1. Unavoidable and avoidable cost increases and their effect
2. Analysis of variances
3. Comparsion of estimated budget to active
4. Delegation of responsibility and isolation of problem areas.

2 hours VIII. Wage and Salary Administration

A. Wage and Salary Scheduling
B. Supplemental benefits

4 hours IX. Projections

A. Long term budget planning for expansion of existing facilities

B. Capital Requirements to open a new home or to expand and existing one.

C. Suggested Resources

American Hospital Association, Bookeeping Procedures and Business Practices for Small Hospitals.

Cahman, "Manpower Needs in Nursing Homes", Employment Service Review, Nov. 1966.

Cyert & March, A Behavioral Theory of the Firm

Smith, "How to Translate Policies into Procedures", Hospital and Nursing Homes Food Management, Vo. 3, Sept. 1967.

Zeman, Further Observations on Clinical Errors in the Care of the Elderly, Community Health Service, DHEW.

D. Suggested Faculty

Lester Mary Ambrosette
Member, National Advisory Council
for Nursing Home Administration

Dr. Harold Baumgarten
Chairman, National Advisory Council
for Nursing Home Administration

Mr. Charles A. Cubbler, Executive Secretary
National Advisory Council for Nursing
Home Administration

Frederick W. Gibbs
Department of Health Care Administration
George Washington University

Dr. James Owens
Department of Business and Public Administration
The American University

Seminar IV

A. Objectives

1. To develop ways of improving the relationship of the nursing home to the local community.

2. To gain insights into models of effective public relations.

3. To develop standards of both professional and medical ethics for nursing home administrators.

4. To understand the basic premises and constraints in long and short range organizational planning.

5. To develop specific plans for implementing knowledge and skill acquired at the Seminars back-home.

B. Content

2 hours I. Climate-building

6 hours II. Community Inter-relationships

A. Health services and services in the community

B. Community resources

a. religious
b. schools
c. service agencies
d. government agencies

C. Extension of services to outresidents

D. Community health care planning

3 hours III. Principles in Public Relations

A. Advertisement

a. Through media techniques
b. Printed matter
c. Word-of-mouth

B. Reputation

5 hours IV. Professionalism

A. Need for uniform standards

a. Professional
b. Medical
c. Physical Plant

B. Continuing Education and self-development

C. Licensure

5 hours V. Organizational Planning

A. Long-Range Planning

a. steps in the planning process
b. organizational problems in long-range planning
c. assessing current and future capabilities, opportunities and developing objectives

B. Short-range planning

C. Written and unwritten policies

D. Planning for change

8 hours VI. Developing back-home strategies for change

C. Suggested Resources:

Conwell, "Identifying the Nursing Home of the Future," Nursing Homes, February 1965

Rodger A. Golde, Practical Planning for Small Businesses, Harvard Business Review

Robert H. Schaffer, Putting Action Into Planning, Harvard Business Review

Spiegel, Citizen Participation

D. Suggested Faculty:

Dr. Donald Klein
Program Director
Center for Community Studies
NTL Institute

Mr. Fredric H. Margolis
Consultant in Management Training

Mr. R. Ray McCain
Leadership Resources, Inc.

Mr. Leonard Nadler
Department of Adult Education
George Washington University

Mr. Daniel Safran
University of Maryland
School of Social Work

D. APPENDIX

APPENDIX
PART I

SURVEY OF NURSING HOME ADMINISTRATORS

Office of Programs for Executive Development
of the Conferences and Institutes Division
University of Maryland
College Park, Maryland 20742
(to be completed anonymously)

1. Current Position _____ How Long? _____

2. Previous Position _____ How Long? _____

3. What are the three most important responsibilities of your job?

   a. _____
   b. _____
   c. _____

4. What do you like most about your job?

5. What do you like least about your job?

6. Education:

School or College	Attended year to year		Subject of Study	Degree or Certificate

7. Have you had any educational experiences relative to your present position? if so, what were they?

8. How large is your facility? Circle one: small -- medium -- large.

9. How many beds are utilized? _____

10. How would you characterize your facility? Circle one.

    a. Provides skilled nursing care.
    b. Provides limited skilled nursing care.
    c. Provides no skilled nursing but assists in personal care.
    d. Provides a residential facility without nursing or personal care.

11. Is a physician on the premises? yes_____ no_____
    How many hours a day? _____

12. How many of the following staff do you employ?

    a. registered nurses _____
    b. practical nurses _____
    c. nurses aids _____
    d. other (list them) _____

13. What are the two most pressing problems which you must face as the administrator of your home?

Please complete the following sentence portions.

14. The aspect of my job which I think I do best is

15. What motivates me in my present job is

16. The most important quality to have as a nursing home administrator is

17. The most distasteful part of my job is

18. I expect the Management Seminar Series for Nursing Home Administrators to

19. What I most want to learn from the Management Seminar Series is

Return to:

Jan Peck, Coordinator
Conferences and Institutes Division
Center of Adult Education
University of Maryland
College Park, Maryland 20742

Appendix - Part I

RESULTS OF SURVEY

I. SMALL NURSING HOMES (Average size 30 beds)

*1. Current Position

administrator 14 (assist. administrators, 1 co-director and administrator)
manager 1
director 2

2. Previous position

administrator 2
assistant to administrator 1
head resident of dormitory at colleges 1
none 1
supervisor in health related fields 1
supervisor in (non) health fields 2
nurse 4
nursing
general manager 1
inspector (General Motors) 1
security officer
executives of corporation 1
orderly 1

4. What do you like most about your job?

a. compassion helping others 3
b. all of it 1
c. opportunity to serve 4
d. challenge of problem 2
e. personnel management 2

5. What do you like least about your job?

a. solving staff problems 3
b. hiring new employees
c. collection of bills 2
d. economic
e. paper work 2
f. contending with regulations 2
g. no dislikes 2
h. personal relationships

---

* Numbers refer to questions on the Survey.

3. What are three most important responsibilities of your job?

A. Correlation between guests of home
Provide good care to residents
Develop resources in order to provide total patient care
Personnel management
Formulatery duties for personnel
Financial management
Welfare of patients
Proper patient care
Hiring competent people
Patient care and placement
Own and manage nursing home
Providing for welfare of residents
Keeping good help
Best possible care of patients
Keeping accurate books
Physical and mental well being of patients
Delegate duties and responsibilities and follow up on patient care

B. Various departments, administrators, food, etc.
Accept and execute guidelines of Md. State Health Dept.
Develop and direct organization
Quality service at best price
Handling nursing and administrative records
Organizational management
Establish good employee-employer relationship
Staff qualifications
Prividing adequate nursing services
Nursing supervisor - Supervisor of patient care in general
Operating under budgets - Operating a profit
Promote teamwork
Hiring competent help
Budgeting and expendatures
All supplies and equipment

C. Good management
Co-ordinate various depts.
Cleanliness
Making workable rules, policies, and procedures
Personnel management
Co-ordination of business operation
Bookkeeping - Bill collection - Secretaril work - Supervision of personnel
Co-ordinating work of departments
Public relations
Co-ordinate community relations and nursing home
Keeping expenses within budget
Maintenance and up keep of plant and grounds
Work within budget

Appendix - Part I

Education:

University of Md.	courses
by special test	High School Diploma
George Washington	M.B.A.
High School	
Crownsville State Hospital	Nursing (L. P. N.)
Business College	Certificate
New York University	B.A.
Southern High School	
Columbia Union School	B.S.
Eastern Shore State Hospital	Diploma (L.P.N.)
Union State Hospital	Post-Grad Work
Various Colleges	75-80 hours
University of Baltimore	L.L.B.
University of Md.	

7. Educational courses relative to present position

Educational Courses
Recreational Courses
None
Workshops
Nursing
Attendant at State Mental Hospital
Seminar - Industrial psychology and business administration
Army Medical Corp.

8. & 9. How large is your facility? How many beds?

27, 43, 90, 82, 18, 23, 28, 32, 36, 58, 23, 26, 18, 70, 55 = 30 Average

10. How would you characterize your facility?

a. Provides skilled nursing care - 15
b. Provides limited skilled nursing care - 12
c. Provides no skilled nursing but assists in personal care - 0
d. Provides a residential facility without nursing or personal care - 0

11. Is there a physician on the premises?

yes 17 no 0

12. How many of the following staff do you employ?

a. registered nurses	38
b. practical nurses	38
c. nurses aids	162
d. other	73

13. What are the two most pressing problems which you must face as the administer of your home?

1. Cooperation between departments
   Secure M.D. to live locally
   Meaningful in-service training program
   Personnel
   Negotiating with State Health Dept.
   Budgeting
   General administration
   Maintain 24 hour personnel for patient care

2. Correlation between Administrative Boards and Supervisors of Depts.
   Secure and Maintain good R. N.
   Budgeting
   Maintenance personnel
   Negotiating with county social service department
   Government procedures
   Record Keeping

18. I expect the Management Seminar Series for Nursing Home Administrators to

- give me a broad view of administration and its related responsibilities.
- prepare me for the examination of administrators.
- be a useful prelude prior to taking the newly required examination for licensure.
- develop my abilities to cope with the many and divers problems correlated with operating a nursing home.
- perhaps acquaint me more fully with what is expected of an administrator.
- fill in educational gaps left by college and experience.
- enlighten me in better ways to improve our Nursing Home.
- enlighten other nursing home administrators the importance of better nursing services, elimination of odors in homes, etc. Concentrated and establish a better reputation for each home.
- fill in the "how to" detail to meet requirements, the rules, the procedures, etc; and then bring in all thats new in the field of caring for ageds and/or infirms.
- increase my knowledge of leadership-legal aspects-regulations-better personal nursing care to patients.
- be a prosperous and better administrator.
- help me solve problems in the areas in which I feel I am weakest.
- help me be a better manager.

19. What I most want to learn from the Management Seminar Series is

- to better my ways and means of dealing with "staff relationships to other staff."
- any techniques that would improve my ability as a Nursing Home Administrator.
- what an administrator is expected to know.
- knowledge others in my type of work feel is necessary for competent administration.
- to become the best manager for our home.
- discussion on business administration.
- a way to educate Board Members as to what they have and what they should do about it.
- how to maintain and operate a 1st class home within a limited budget, including medicaid and welfare patients.
- how to create a better image of the nursing home in the community.
- the rights and the wrongs about nursing care and thoroughly learn the business as a businessman.
- to be a better administrator.
- how to better advice and assist department heads in their responsibilities.

II. MEDIUM NURSING HOME (Average 72 beds)

1. Current Position:

Owner and Administrator 3
Administrator 7

2. Previous Position:

Administrator 2
Teacher 2
Parish Priest
Beauty Operator
Quality Control Director
Executive Assistant
General Construction Supervisor

3. What are the three most important responsibilities of your job?

A. Medical and nursing care of the patient
Personnel
Develop the best skilled nursing program possible
Keeping help
Personnel Management
Delegation and organization of work
General Administrator
Total operation of Home
Administrator
Public Relations

B. Public Relations
Cost Control
Control of home
Admission
Financial and Budgetary Management
Budgeting
Buying
Develop and maintain good personnel
Keeping up with regulations
The happiness and contentment of the patient

C. A physical institution equipped to meet all requirements
General overall supervision
Maintain physical standards
Paying bills
Purchasing of all foods
Public Relations
Decision making
Financial assests of the Home
Cost control
Staff relations

4. What do you like most about your job?

a. Meeting the public
b. Challenge of solving different problems
c. Everything that goes with the job
d. Compassion and understanding the residents
e. Delegation and organization of work
f. Personnel management
g. All of it
h. Sense of achievement in rehabilitation of patients
i. Vary of responsibility
j. Opportunity to serve

5. What do you like least about your job?

a. The monotony of office detail
b. The inability to be able to get proper reimbursement
c. The 24 hour day
d. Getting rid of salesmen
e. Having to do the simple over-looked jobs
f. Sitting in the office long hours
g. Surprises
h. Paper work

6. Education:

St. Louis University	Certificate
John Hopkins University	M.E.D.
Divinity	Certificate
New York University	B. A.
Youngstown University	26 Credits
University of Md.	B.S.
University of Balto.	B.S.

7. Have you had any educational experiences relative to your present position?

Supervisor
Community Health Facilities
Training in the Fields of Physical Therapy
Medical Administrator
Accounting
Economics
Purchasing

8 & 9. How large is the facility? How many beds?
52, 82, 104, 39, 86, 104, 103, 50, 26= 72 average

10. How would you characterize your facility?

a. Provides skilled nursing care 7
b. Provides limited nursing care 2
c. Provides no skilled nursing but assists in personal care 0
d. Provides a residential facility without nursing or personal care 0

11. Is a physician on the premises?

yes 2 no 7

12. How many of the following staff do you employ?

a. Registered nurses 25
b. Practical nurses 38
c. nurses aids 249

13. What are the two most pressing problems which you must face as the administrator of your home?

1. Making good personnel
Keeping abreast of current information
Training personnel
Decision Making
Keeping cost control

2. Keeping accounting systems for medicare
Getting qualified personnel
Operating within a budget
Financial Problems
Getting maximum effort from personnel

18. I expect the Management Seminar Series for Nursing Home Administrator to:

a. Teach the nursing home administrators a uniform language
b. Improve my ability to cope with salesmen
c. Absolutely nothing, you cannot operate by a book
d. Help in getting a license as a Nursing Home Administrator
e. Help be a better administrator
f. Provide some basic knowledge in Management Theory and Principle

19. What I most want to learn from the Management Seminar Series is:

a. How other administrators handle their various problems
b. How to cope with the "red tape" of the Medicare Program
c. Anything you can offer
d. To carry out the job with competence
e. Information about every aspect of nursing home management
f. Some technical skills that are becoming necessary to be a successful administrator
g. How to face the ever increasing costs of salaries, food, utilities, and taxes on a limited sorce of funds.

III. LARGE NURSING HOMES (Average 174 beds)

1. Current Position:

Administrator 4
Controller 1
Superintendent 1

2. Previous Position:

Administrator 2
Military Service 1
State Trooper 1
General Manager 1
Assistant Executive Director 1

3. What are the three most important responsibilities of your job?

A. Maintenance of good patient care
Organization of all Accounting functions
Purchasing
Planning
The total comfort and well-being of clientele
Employee Relations

B. Being a good Public Relations Representative
Obtaining and keeping qualified personnel
Organizing
Developing good policies
Purchasing Control
Supervision of all departments

C. Purchasing and cost control
Personnel, new and present employees
Maintaining good community relations
Coordinating and controlling
Keeping up with regulations
Being able to have knowledge of the different departments

4. What do you like most about your job?

a. The satisfaction of seeing elderly individuals being taken care of
b. The satisfaction of caring for the aged
c. Working with the managers in the institution
d. Association with and the opportunity to assist people
e. The organization and direction of all departments
f. It allows freedom of decision

5. What do you like least about your job?

a. Having to terminate someone
b. Does not dislike any duty
c. Overabundance of paper work
d. Attempting to staff properly in the face of shortage of personnel
e. Having to deal with families whose parents are on welfare
f. It is a 24 hour day job

Appendix - Part I

6. Education:

High School	Equivalence diploma
High School	Diploma
St. Louis University	MHA
University of Virginia	
McCoy College	

7. Have you had any educational experiences relative to your present position?

Controller Management 6 years
Seminar
Workshops
Institutes

8&9 How large is the facility? How many beds?

124, 89, 342, 236, 140, 115= 174 Average

10. How would you characterize your facility?

Provides skilled nursing care 5
Provides limited skilled nursing care
Provides no skilled nursing but assist in personal care
Provides a residential facility without nursing or personal care

11. Is a physician on the premises?

yes 2 no 4

12. How many of the following staff do you employ?

a. registered nurses 48
b. practical nurses 19
c. nurses aid 198

13. What are the two most pressing problems which you must face as the administrator of your home?

1. Being able to obtain qualified employee's
Being able to keep posted with the ever changing times
To become a qualified nursing home administrator
To finance new construction to keep up with state and federal regulations
Staffing

2. Improving dietary management
Being controller
Obtaining needed funds
Keeping abreast of the rapidly changing regulations
Turn over in subsidiary personnel
Control of costs with rising prices

18. I expect the Management Seminar Series for Nursing Home Administrator's to:

a. To stress personnel management, cost control
b. Prepare young people for the responsibility of a lucrative and wide open field
c. More knowledge
d. Better qualified individuals to carry out their duties in a more capable manner
e. Help pass examination for the Nursing Home Administrators
f. A Broader knowledge in the field of management in Nursing Homes
g. Some practical experience

19. What I most want to learn from the Management Seminar Series is:

a. To be a more qualified administrator
b. To give better patient care
c. Better personnel relations
d. A brader knowledge of State approved and profitable guide lines
e. Good management policies
f. A better and more efficient administrator

APPENDIX
PART II

Pre-Session Design
Management Seminar Series
for
Nursing Home Administrators

	Time
1. Introduction	
A. Purpose of the meeting	
1. to gather additional information about the learning needs of nursing home administrators	5 min.
2. to check what has been communicated about the Seminars	
3. to experience a participative way of working together	
B. Questions relevant to the purposes of the meeting	
2. A philosophy of learning and working together	5 min.
3. Work in groups of five with people you know least and talk among yourselves for ten minutes. Decide on three things you would like to know about a person you would consider hiring to replace you.	10 min.
4. Briefly share these in total group	5 min.
5. Small groups: Interview one another using the questions from the previous exercise.	25 min.
6. Total group: What is your expectation of the Seminars?	10 min.
7. Small groups: Talk about things you would like to learn at the Seminars for yourselves and list the four or five most important. Divide these into knowledge and skills.	20 min.
8. Total group: Process the data	15 min.
9. General sharing and contracting	15 min.
10. Evaluation and reactions to this meeting	10 min.
A. To what degree do you feel we accomplished the goals set for this meeting?	
B. Do you like the way we went about doing it?	

Total time: 2 hours

Appendix - Part II

Data from the Pre-Session

1. Things I would like to know about a person I might hire to replace me.

- experience, education, dedication, motivation (reasons for wanting to be in the business), personality.
- ability in public relations; personnel management; dealing with people.
- ability to accept rapid change
- ability to keep one step ahead of the people who complain when they pay the check
- feelings for the elderly and those who have guilt in placing their parents in a home
- psychology
- ability to analyze a situation
- ability to handle many things at the same time and remain calm
- ability to work within the budget

2. Expectations for the Seminar

- make information on the laws, regulations, etc., more concise
- help us prepare for licensure
- bring together all the jobs we have to do
- organize material to see clearly what is necessary for licensure
- we have the knowledge - we just want it refined
- want one evening free - baby-sitting problem
- teaching methodology: we want some experts in our field
  don't lecture to us
  want participative learning
- we have had so many different norms - tell our instructor to hit a norm

3. What we want to learn

Knowledge

- principles of management
- budgeting, cost control, purchasing
- knowledge of regulations
- legal aspects (disaster plan and safety regulations)
- medical care; disease control

Skills

- how to write job specifications and institute them
- leadership; communication with employees physicians, families; team-building
- how to provide in-service training
- how to work with people
- how to organize time and work; how to set priorities in tasks
- how to delegate responsibilities
- how to control: directing and follow up
- how to conduct interviews with family and employers
- how to improve the image of my home in the community; public relations
- how to create policies and implement them

APPENDIX
PART III

Management Seminar Series
The University of Maryland

Sample Evaluation Form

1. In terms of meeting your needs and operations, how would you rank this Seminar?

_____poor _____fair _____good _____excellent

2. How do you feel about the amount of presentation and the amount of discussion?

_____too much presentation _____too much discussion

_____just enough presentation _____ just enough discussion

_____too little presentation _____too little discussion

3. Will you do anything differently on your job as a result of the Seminar?

_____yes _____no _____maybe

If yes, what?

4. Please read all of the following comments. Then, circle the letter preceding all those that state how you feel about the Seminar as a whole?

a. Exactly what I wanted
b. One of the most rewarding experiences I ever had
c. Provided me with the kind of experience I can apply to my own situation
d. It was neither very good nor very poor
e. It was too general
f. It was too superficial
g. It was poorly handled
h. It was a waste of time

5. What is the single most important thing you learned from the Seminar?

Appendix - Part III

6. What were the strengths of the Seminar?

7. What were the weaknesses of the Seminar?

8. Is Leavitt's text, Managerial Psychology worthwhile to you?

_____yes _____no _____don't know _____haven't read it yet

9. Is the manual of Selected Readings and Resources worthwhile to you?

_____yes _____no _____don't know _____haven't read it yet

10. What is the one thing you would like to tell the trainers for the Seminar?

APPENDIX
PART IV

Management Seminar Series

University of Maryland
May 4 - 7, 1969

Knowledge Acquired and Instructor Evaluation

Knowledge Acquired (Left Side of Page):

This evaluation instrument requires that you make a distinction between (1) information which you did not know of before this Seminar, and (2) information which clarified, amplified or simplified your thinking.

Although the format encourages you to be brief and to the point, do not be general. Avoid simply saying, "I learned more about "a budget." Related the primary information you picked up in each session.

Instructor Evaluation (Right Side of Page):

We are interested in your opinion of the topics and the quality and expertise of the leadership for this Seminar.

As you recollect each session of the Seminar, mark your impression regarding the session on the two items below. To indicate your impression, circle the proper number.

How important was the subject or discussion topic for you?

Column A

Most important----------5
Very important----------4
Some importance----------3
Little importance----------2
No importance----------1

What did you think of the technique and style of presentation?

Column B

Exceptional----------5
Very good----------4
Good----------3
Fair----------2
Poor----------1

Appendix - Part IV

Knowledge Acquired		Instructor Evaluation	
		Importance of topic	Presentation
COMPLETELY NEW INFORMATION	CLARIFIED, AMPLIFIED, SIMPLIFIED INFORMATION	Rating Column A	Rating Column B
Linkage and Preparation for Resource People - Margolis			
		5 4 3 2 1	5 4 3 2 1
Fire and Safety Regulations - Robertson			
		5 4 3 2 1	5 4 3 2 1
Applications for Federal, State, or Non-Grant Construction Projects Hill Burton - Antisdel			
		5 4 3 2 1	5 4 3 2 1
Improving Patient Care Through Standards, Licensure, and Accreditation Maxwell			
		5 4 3 2 1	5 4 3 2 1

Appendix - Part IV

Knowledge Acquired		Instructor Evaluation	
COMPLETELY NEW INFORMATION	CLARIFIED, AMPLIFIED, SIMPLIFIED INFORMATION	Importance of Topic Rating Column A	Presentation Rating Column B
	Measuring and Controlling Functions of Management Shulbank	5 4 3 2 1	5 4 3 2 1
	Measuring and Controlling Functions of Management Rosenfeld	5 4 3 2 1	5 4 3 2 1
	Measuring and Controlling Functions of Management Rosenfeld	5 4 3 2 1	5 4 3 2 1
	Application and Consultation - Ehat	5 4 3 2 1	5 4 3 2 1

APPENDIX
PART V

MANAGEMENT SEMINAR SERIES II

FOR

NURSING HOME ADMINISTRATORS

UNIVERSITY OF MARYLAND

1969:

April 7-10; May 4-7; June 2-4; July 14-16

Total Program Evaluation

Appendix - Part V

Management Seminar Series

Part I:

1. a. Looking back on your experiences during the Seminar Series, in what ways were the Seminars different from what you had expected?

b. In what ways were the Seminars similar to what you had expected?

2. The Seminar Series will undergo an extensive evaluation and possible re-development this summer. What changes would you make in the Series if it were conducted again for another group of nursing home administrators? Please try to be specific.

3. It was the responsibility of Jan Peck as Coordinator for the Office of Programs for Executive Development to develop the Seminar Series, plan content and methodology, select trainers, design evaluations etc. Please evaluate her in terms of her fulfillment of these responsibilities.

Appendix - Part V

Part II: Individual Seminar Evaluation

As you recollect each seminar of the Series, indicate your impression of the Seminar on the two items below by circling the proper number.

How important was the Seminar to you?

Column A

Most important----------5

Very important ----------4

Some importance ----------3

Little importance ----------2

No importance ----------1

Were the trainers (or instructors) clear & effective in their presentations?

Column B

Exceptional----------5

Very good ----------4

Good----------3

Fair ----------2

Poor ---------- 1

Seminar		Relating Column A	Rating Column B
Seminar I	(Margolis & Peck)	5 4 3 2 1	5 4 3 2 1
Seminar II	(et. al.)	5 4 3 2 1	5 4 3 2 1
Seminar III	(Ehat)	5 4 3 2 1	5 4 3 2 1
Seminar IV	(Ehat)	5 4 3 2 1	5 4 3 2 1

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on Adult Education

Part III: Content Evaluation

The Series attempted to focus upon four functions of management and their application. Please rate these content units according to how adequately they were covered and the degree of their importance to you.

How adequately was the managerial function covered?

Column A

Excellent coverage----------5

Very good----------4

Good----------3

Fair----------2

Poor----------1

How important is the managerial function to you?

Column B

Most important----------5

Very important----------4

Some importance----------3

Little importance----------2

No importance----------1

Management Function	Rating Column A	Rating Column B
1. Planning, including problem analysis and decision-making.	5 4 3 2 1	5 4 3 2 1
2. Organizing, including policy formation, centralization vs. decentralization & structure.	5 4 3 2 1	5 4 3 2 1
3. Leading & Directing, including management styles, communication patterns & supervision.	5 4 3 2 1	5 4 3 2 1
4. Measuring & Controlling, including budgeting, use of accounting & employee evaluation.	5 4 3 2 1	5 4 3 2 1
5. Application, including the integration of the above into your specific nursing home situation.	5 4 3 2 1	5 4 3 2 1